for SERIOUS fleets

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AF's NEW FLEET MANAGER STUDY

Identifying Job Problems & the Training to Solve Them

Cost-Effective Truck Remarketing

Who Were 1992's Volume Buyers?

Professional Fleet Manager Award Finalists

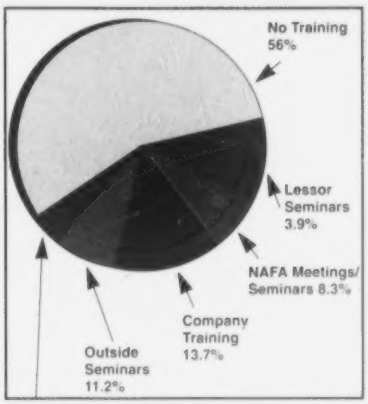
automotive FLEET®

CAR AND LIGHT TRUCK FLEET AND LEASING MANAGEMENT MAGAZINE

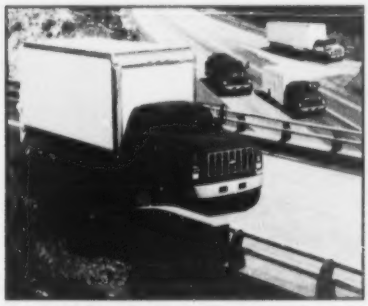
BOBIT PUBLISHING

April 1992
VOL. 31, NO. 6

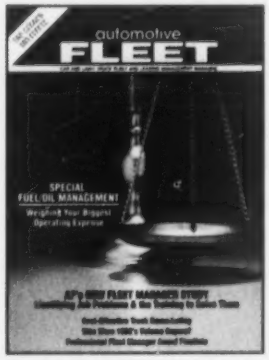
Influencing the management of 5,072,000 cars and 2,209,000 light trucks and vans in business, leasing, rental, utility, government, police, and taxi fleets.



Page 56 *— Find out what problems fleet managers will be encountering in the next three years and the training they need to overcome these management challenges.*



Page 144 *— Remarking light- and medium-duty trucks can add to a fleet's overall value — as long as you don't hang onto them too long before selling.*



On the Cover *— Weighing your options in light of clean-fuel mandates can be confusing. For more information, see our Special Report beginning on page 27.*

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Dodge Electric Vehicle Concept Unveiled

The Dodge EPIC (Electric Power Inter-urban Commuter) concept minivan begins the thesis for the future design of Chrysler minivans. Its emission-free electric motor represents Chrysler's current state of development for electric-powered vehicles. Chrysler's TEVan program is investigating the feasibility for future electric-powered vehicles.

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study of national associations by the American Society of Association Executives reported that 75 percent of all associations anticipated either no growth or a decline in membership for 1991.

NAFA Helps Stall Govt. Member Restrictions

A U.S. Government plan to restrict government employee participation in not-for-profit associations has been stalled. Stephen Potts, director of the Office of Government Ethics (OGE), has advised the National Association of Fleet Administrators (NAFA) that the section covering the possible limitation of NAFA involvement by members who are also employed by the government has been eliminated from final ethics regulations. In his letter to NAFA, Potts said that each agency would have the authority to grant excused absence for whatever purpose he or she deems appropriate. NAFA had submitted a letter to the OGE on behalf of members who are employed by federal agencies.

SAFETY UPDATE

Larger Cars Are Safer Cars

Larger cars are the winner in the debate over occupant safety, according to a study published by the Insurance Institute for Highway Safety. The report shows that people in small cars are four times more likely to die in an accident than the occupants of a larger vehicle.

According to the report, size alone is not the only factor in vehicle safety. To further improve safety, the

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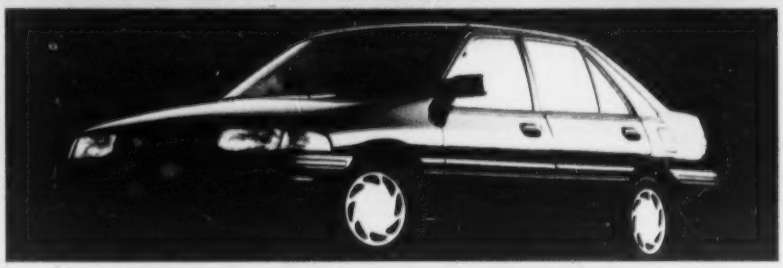

Ford Introduces Early 1993-Model Escort

The 1993-model year Ford Escort will have new exterior and interior appointments, including color-keyed bumpers and body-side moldings, a new grille, and new tail lamps and wheelcovers. The 1993-model year Escorts will be available in mid-May 1992.

We can cut your fleet fuel costs by 15%.

You may not know what it costs to fuel your fleet, *but we do*. And we can can do it better, faster and **for 15% less than you're now paying**.

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- preventative maintenance mileage interval readings
- line-by-line cost control and accountability of fuel and TBA item expenses

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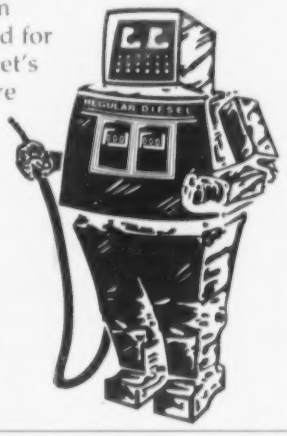

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institute recommends that all cars be equipped with anti-lock brakes, airbags, seat belts with adjustors for proper fit, and properly designed head restraints.

Vehicle Death Rates by Vehicle Size

Wheelbase (inches)	Occupant Death Rate per 10,000 Registrations
under 95	2.9
95 to 99	2.1
100 to 104	2.1
105 to 109	1.4
110 to 114	1.1
over 114	.07

Insurance Industry Studies Show Airbags Work

Airbags in vehicles save lives, decrease the severity of injuries, and reduce the number of hospitalizations due to frontal crashes, according to two new studies from the insurance industry that quantify the effectiveness of these safety devices.

The first study, done by the Insurance Institute for Highway Safety (IIHS) shows that airbags reduced fatalities in frontal crashes by 28 percent. The second study, completed by the Highway Loss Data Institute (HLDI), found that airbags decreased moderate to severe injuries by 25 to 29 percent, and reduced hospitalization rates by 24 percent.

The IIHS analysis of data from the fatal accident reporting system for the years 1985-91 determined that airbags produced an overall de-

FLEET OPERATIONS

PRESENTS THE

automotive FLEET®

PROFILE & REFERENCE CHART OF COMMERCIAL FLEETS

The Fleet Manager

8,100 Fleets/Fleet Managers

	Operations	Buy New/Yr.
Cars	2,910,000	900,000
Lt./Med. Trucks & Vans	1,220,000	550,000

Leased/Managed	86%
Owned	14%

	'90 Buying	'92 Buying
Cars	63%	58.6%
Vans	20%	15.5%
Lt. Trucks	17%	25.9%

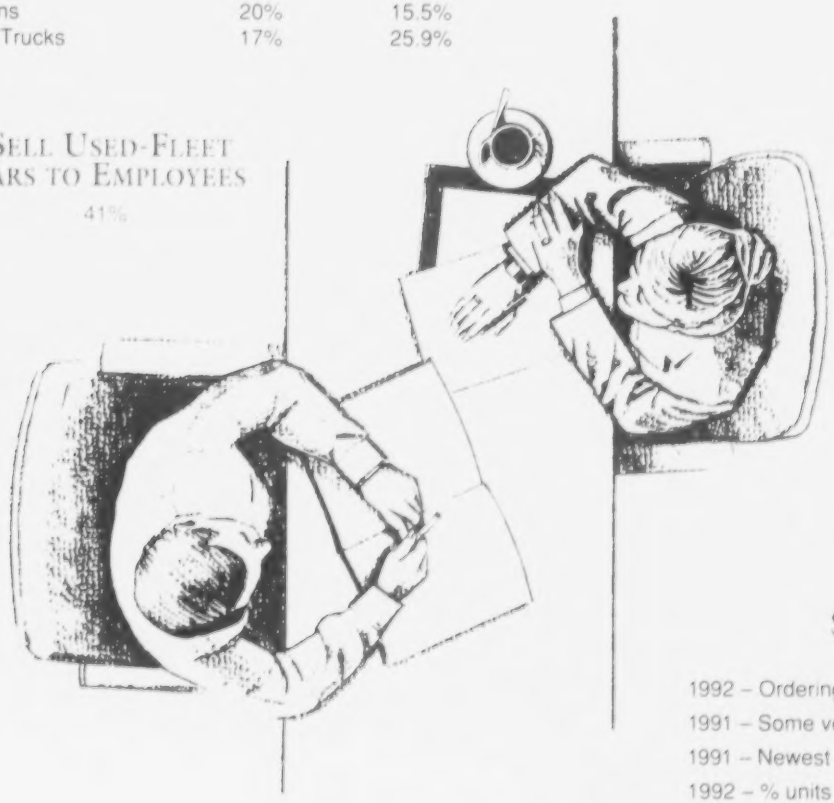
Fleet Management Time Allocation

By Time Devoted: By Annual Company Fleet Budget Range

	$200,000 or Less	$200,001-$500,000	$500,000-$2,000,000	$2,000,001 or More
Full Time	4%	14%	32%	68%
Part Time	61%	79%	66%	29%
None	35%	7%	2%	3%

Sell Used-Fleet Cars to Employees

41%



Demographics

Male	74.8%
Female	25.2%
Age	43.8 yrs.
In position	5.3 yrs.

Average Salary

$42,520

Median Salary

$37,919

Accidents

Total reportable accidents	19,110
Total preventable accidents	9,261
Total non-preventable accidents	9,849
Total accident ratio/million miles	9.39
Total preventable accident ratio/million miles	4.55
Total non-preventable accident ratio/million miles	4.84
Personal injuries	1,679
Fatalities	26
Vehicle damage per reportable accident	$1,607

Safety & Policy

1992 – Ordering only cars with air bags	29%
1991 – Some vehicles equipped with air bags	53%
1991 – Newest vehicles equipped with air bags	22%
1992 – % units ordered with anti-lock brakes	20%
Written safety polices:	45%
Mandatory seat-belt-use policy:	66%
Defensive-driving program:	35%
Periodic in-house safe-driving meetings:	42%
Accident review boards:	26%
Safe-driver incentive programs:	15%
Check of employee's driving records prior to employment:	58%
Periodic check of driving records after employment:	58%

Note: Automotive Fleet's Research Dept. is solely responsible for assembling data 2/2/92

THE VEHICLE PURCHASE CONSIDERATIONS

The professional fleet manager considers **all** the major purchase elements to arrive at the most cost-effective and functional total fleet.

MAZDA suggests the consideration of the following key criteria in making your purchase / lease / selector decision:

- FUNCTIONAL REQUIREMENTS
  appropriate size and equipment level
- ACQUISITION COST
  competitive price including incentives
- WARRANTY
  full coverage (not limited or drivetrain only)
- OPERATING COST
  fuel, oil, maintenance, tires, insurance, etc.
- RESALE VALUE
  depreciation
- SAFETY
  air bag, anti-lock brakes and related options
- DRIVER COMFORT / SATISFACTION
  driveability, image, morale and desire

For fleet selection, ordering and delivery information just call:

MAZDA **Fleet Operations**

714 / 727-6339

The Drivers

Demographics

Sex:

Male	91%
Female	9%

Age:

25-34	25%
35-54	61%
55 and over	14%

Gasoline Usually Purchased

Company	
Shell	13.6%
Amoco	12.5%
Texaco	11.9%
Mobil	10.8%
Exxon	9.6%
Chevron	6.3%
British Petroleum (BP)	5.0%
Phillips 66	3.9%
Sunco	3.9%
Unocal	3.1%

Replacement Oil Purchased

Brand Name	
Quaker State	24.9%
Pennzoil	22.0%
Valvoline	9.4%
Castrol	8.1%
Mobil	5.5%
Havoline	4.8%
Shell	4.2%
Texaco	3.9%
Amoco	2.3%

Tire Brand Preferred

Brand Name	
Goodyear	47.0%
Michelin	19.7%
Firestone	14.0%
Goodrich	4.4%
Bridgestone	3.0%
Uniroyal	2.9%
General	1.4%

Income

Driver Only		Combined (Family)	
$25K – $35K	26%	$50K – $75K	64%
$36K – $50K	38%	$76K – $100K	24%
$51K – $75K	26%	Over $100K	12%
Over $75K	10%		

Major Credit Cards Carried

Credit Card	Company	Self
American Express	53%	40%
AT&T Universal	74%	11%
MasterCard	96%	2%
Diners Club	41%	46%
Discover	93%	1%
VISA	95%	2%

Air-Flights Per Year

No. Flights	Respondents	%
1-5	1273	62.8
6-10	363	17.9
Over 10	391	19.3

Car Rentals – Days Per Year

No. Days	Respondents	%
1-10	1442	74.8
11-25	295	15.3
Over 25	191	9.9

Hotel / Motel – Nights Per Year

No. Nights	Respondents	%
1-10	753	36.1
11-25	603	28.9
Over 25	729	35.0

Optional Equipt. Drivers Would Like

(If paid for by Company)

Air Bag	71%
Anti-Lock Braking System	77%
Anti-Theft Systems	79%
Speed Sensitive Steering	86%
Vehicle Maintenance Monitor	90%
Traction Navigation Systems	87%
Cellular Phone	73%
Fax	84%

Added Options – Ordered / Purchased

***Includes after market products and driver paid-for options.**

AM/FM Radio	9.8%
Cassette/Tape Deck	9.8%
Cellular Telephones	9.8%
Radar Detector	7.7%
Power Windows	7.3%
C/D	6.1%
Power Door Locks	5.5%
CB	4.8%
Cruise Control	4.3%
Power Seats	3.6%
Tinted Windows	2.4%
Alarm Systems	1.8%

Fleet Managers ID Job Problems & Training Needed to Solve Them

Surveyed managers identify containment of fleet operations expense as their Number One challenge in the next three years. Not surprisingly, the need for further training in financial analysis is a top priority.

What do fleet managers see as the biggest management challenges facing them in the next three years? And, just as importantly, what training do they need to successfully overcome these challenges?

To determine the answers to these and several other questions, *Automotive Fleet* recently conduct-

Chart 1
What specific training have you received in the past year to strengthen your fleet management abilities?

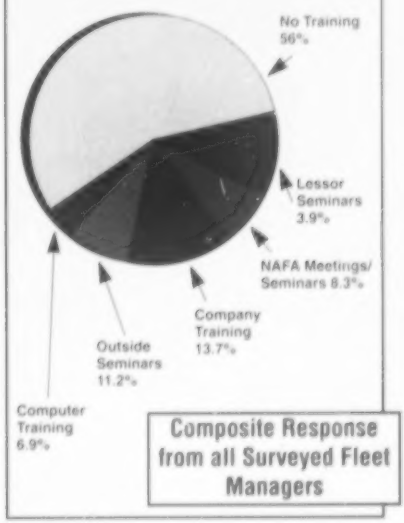
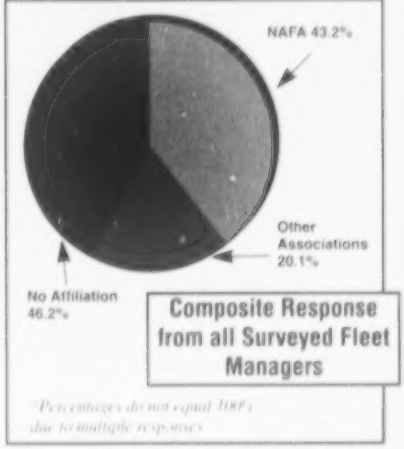
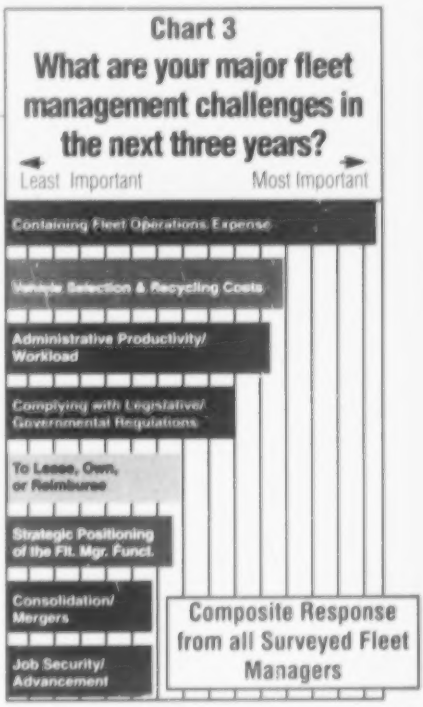


Chart 2
To which fleet association(s) do you belong?*



*Percentages do not equal 100% due to multiple responses.

Chart 3
What are your major fleet management challenges in the next three years?


Least Important
Most Important
Containing Fleet Operations Expense
Vehicle Selection & Recycling Costs
Administrative Productivity/ Workload
Complying with Legislative/ Governmental Regulations
To Lease, Own, or Reimburse
Strategic Positioning of the Flt. Mgr. Funct.
Consolidation/ Mergers
Job Security/ Advancement
Composite Response from all Surveyed Fleet Managers

Source for all charts: Automotive Fleet Research Department

Chart 4
What kind of management training do you need to help you better manage your "fleet management challenges"?

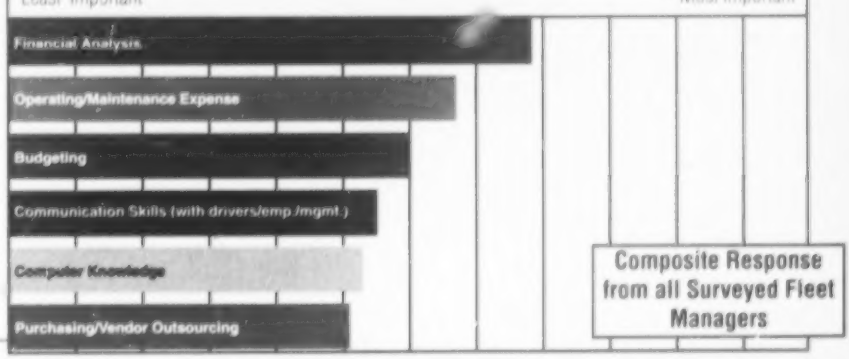
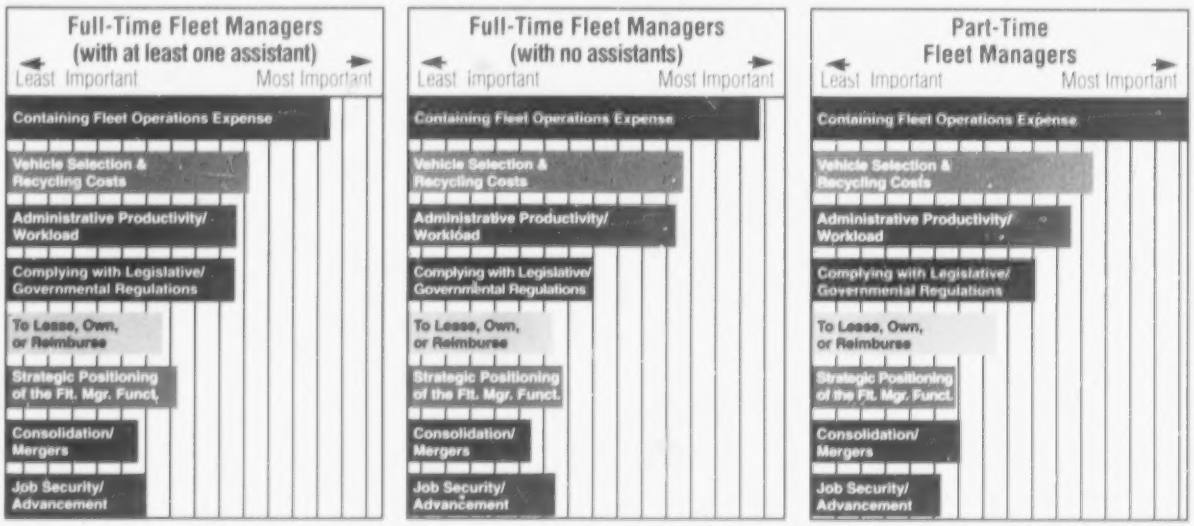


Chart 5
What are your major fleet management challenges in the next three years?


Full-Time Fleet Managers (with at least one assistant)
Least Important
Most Important
Containing Fleet Operations Expense
Vehicle Selection & Recycling Costs
Administrative Productivity/ Workload
Complying with Legislative/ Governmental Regulations
To Lease, Own, or Reimburse
Strategic Positioning of the Flt. Mgr. Funct.
Consolidation/ Mergers
Job Security/ Advancement
Full-Time Fleet Managers (with no assistants)
Least Important
Most Important
Containing Fleet Operations Expense
Vehicle Selection & Recycling Costs
Administrative Productivity/ Workload
Complying with Legislative/ Governmental Regulations
To Lease, Own, or Reimburse
Strategic Positioning of the Flt. Mgr. Funct.
Consolidation/ Mergers
Job Security/ Advancement
Part-Time Fleet Managers
Least Important
Most Important
Containing Fleet Operations Expense
Vehicle Selection & Recycling Costs
Administrative Productivity/ Workload
Complying with Legislative/ Governmental Regulations
To Lease, Own, or Reimburse
Strategic Positioning of the Flt. Mgr. Funct.
Consolidation/ Mergers
Job Security/ Advancement

Source: Automotive Fleet Research Department

ed a survey of fleet managers, of which 135 responded.

The response was almost unanimous. The Number One challenge facing fleet management in the next three years is the containment of fleet operations expense. (See Charts 3 and 5.)

However, fleet managers apparently do not see themselves well equipped to address this challenge, since the top answer for the type of training they require is financial analysis. (See Charts 4 and 7.)

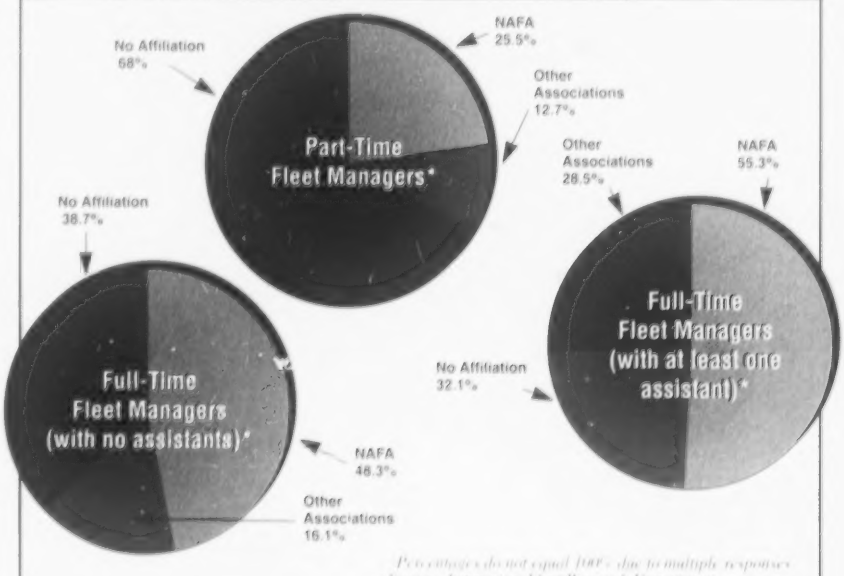
In order to make the survey job-specific, responses from the surveyed fleet managers were divided into three groups: full-time fleet managers with a staff, full-time fleet managers without a staff, and part-time fleet managers.

What stood out in this recent *Automotive Fleet* survey was the uniformity in response when fleet managers identified their key job challenges and the training needed to overcome them.

The top four challenges cited and their ranking in importance were identical, on average, for all surveyed fleet managers regardless of whether they work with or without a staff or handle the fleet function on a part-time basis. These challenges are, in order of importance: containing fleet operations expense, vehicle selection and recycling costs, administrative productivity/workload, and complying with legislative/governmental regulations.

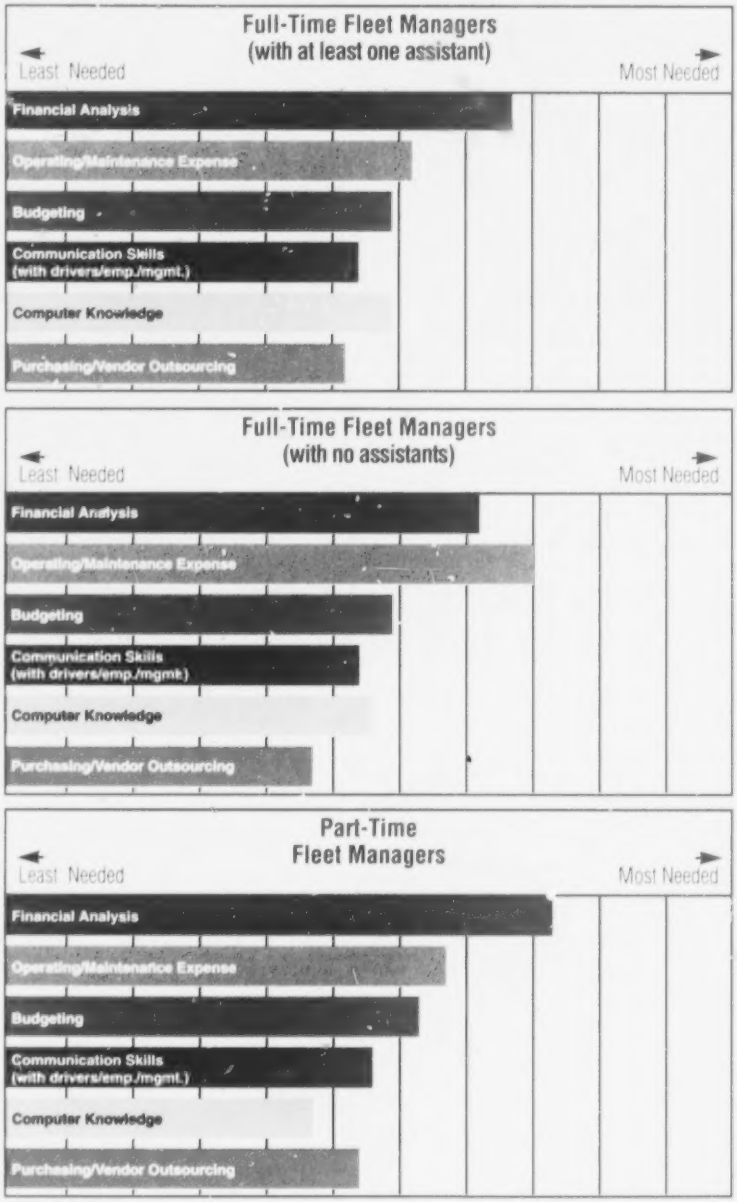
Training support from employers to address these challenges appears to be lukewarm, with 56 percent of all respondents reporting no supplemental fleet-related train-

Chart 6
To what fleet association(s) do you belong?*



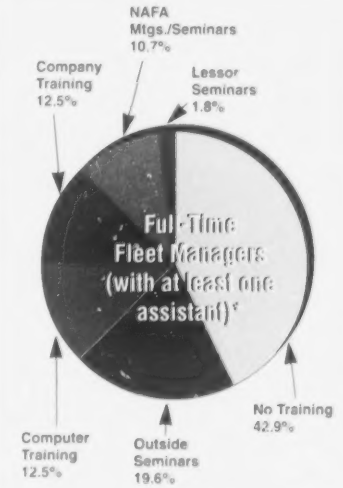
Percentages do not equal 100% due to multiple responses
Source: Automotive Fleet Research Department

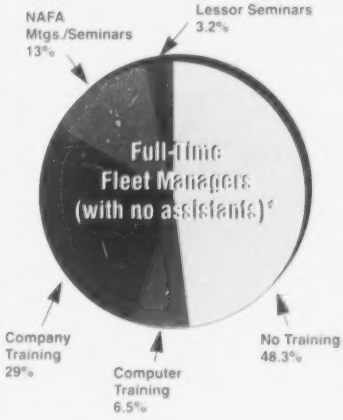
Chart 7
What kind of management training do you need to help you better manage your "fleet management challenges"?

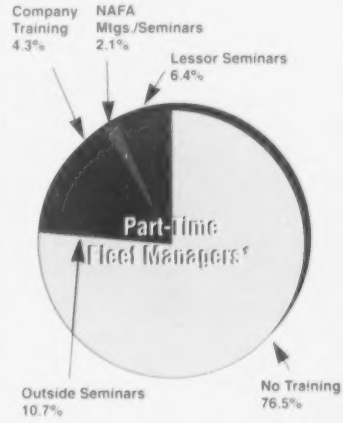


Source: Automotive Fleet Research Department

Chart 8
What specific training have you received in the past year to strengthen your fleet management abilities?







Source for all charts: Automotive Fleet Research Department

ing in the past year. Among part-time fleet managers, training support is even more abysmal with over 76 percent reporting no supplemental training in the past year. (See Charts 1 and 8.)

Another survey highlight revealed that more than 46 percent of the responding fleet managers did not belong to a fleet association. (See Charts 2 and 6.) Among the frequent reasons cited were: limited time, an inability to justify membership cost to management, and, surprisingly, unawareness that fleet associations exist.

Operating Costs Up 3.16 %; Standing Expenses Rise 5 %

Overall operating costs for fleet cars rose on average 3.16 percent in 1991, according to operating cost data compiled by PHH FleetAmerica. This was despite a 17 percent increase in maintenance costs.

Despite a serious national economic recession, overall operating costs for fleet cars increased only 3.16 percent in 1991. Operating expenses consist of the cost of gasoline, oil, tires, and maintenance necessary to operate a fleet car. Although overall operating expenses were up 3.16 percent, maintenance costs increased by approximately 17 percent, according to data compiled by PHH FleetAmerica, a fleet lease and management company headquartered in Hunt Valley, MD.

Extended car life contributed to this increase in maintenance costs during 1991. The key reason average operating costs did not increase significantly despite the increase in maintenance expenses was because of a decrease in fuel costs in the wake of the Persian Gulf war.

The price of fuel decreased approximately 1.5 percent during the year, which had a significant effect on stabilizing fleet operating expenses, because fuel expenses account for 68 percent of all operating costs.

Although operating expenses increased at a slightly greater rate than inflation in 1991, standing expenses grew much quicker. Standing expenses increased by five percent, while incidental expenses increased three percent. Standing expenses include such fixed costs as depreciation and insurance. Examples of incidental expenses are parking fees, washing, tolls, and car storage. Standing and incidental expenses are traditionally measured in a dollar cost per car, per month.

1991 Fleet Car Operation Costs by Region

1 New England 2 MidEast 3 Great Lakes 4 Southeast 5 Plains 6 Southwest 7 Rocky Mountains 8 Far West

The MidEast region of the U.S. had the highest operating and incidental expenses during 1991, but also had the lowest standing expenses in the country. Fleets in the MidEast region tend to hold on to vehicles longer than in other regions, minimizing the number of new-vehicle purchases, which lowers standing expenses.

REGIONAL CODE	OPERATING EXPENSES cents/mile	STANDING EXPENSES $ per month	INCIDENTAL EXPENSES $ per month
1	7.57	385.38	49.98
2	8.02	351.15	61.99
3	7.26	355.44	37.66
4	7.27	360.20	22.15
5	6.86	373.30	26.38
6	7.52	358.22	29.67
7	7.91	386.62	24.08
8	7.70	356.23	37.20
USA	**7.51**	**359.18**	**37.65**

Total Vehicle Count in Top Second 100 Declines

Of the fleets registering a change in size from last year, 16 fleets increased their vehicle count by a total of 2,640 units, but 28 fleets said they lost a total of 10,414 vehicles, resulting in a net loss of 7,774 vehicles.

Sixteen percent of the fleets appearing on the Second Top 100 indicated to *Automotive Fleet's* Research Department that they had increased their fleet size at an average of 165 vehicles, but it was not enough to offset the 28 percent of fleets indicating that they had decreased in vehicle size since last year's listing. The average loss per fleet reporting a size decrease was 371 units. Forty-six percent of the fleets appearing on the Second Top 100 listing did not register a change in their vehicle counts.

Among the reasons for the decreases in fleet size, given by fleet managers whose fleets registered decreases from last year's listing, were reorganization and consolidation of business units within certain companies; the selling off of subsidiary companies and their fleet vehicles; the reorganization of fleet departments, resulting in vehicle-user pools becoming responsible for the management of their vehicles; and reporting fleet sizes before replacement vehicles for out-of-service units had been received. »

Automotive Fleet's Top Second 100 Numerical Cross-Reference

101	ALCO STANDARD CORPORATION
102	PONY EXPRESS COURIER CORP.
103	FLEMING COMPANIES, INC.
104	MILES, INC.
105	PHILIPS MED. SYS. NO. AMERICA
106	AMERICAN HOME PRODUCTS
107	JOHNSON & JOHNSON
108	SHERWIN-WILLIAMS CO.
109	CONTINENTAL INSURANCE
110	JR SIMPLOT CO.
111	OGDEN ALLIED SERVICE CORP.
112	SIMPLEX TIME RECORDER
113	AUTOMATIC DATA PROCESSING
114	TELEDYNE, INC.
115	ALLSTATE INSURANCE CO.
116	LIBERTY MUTUAL INSURANCE
117	SCHERING-PLOUGH
118	EATON CORPORATION
119	BRISTOL-MYERS SQUIBB COMPANY
120	MONTGOMERY WARD
121	USG CORP.
122	HALLMARK CARDS
123	ROCHE BIOMED LABS
124	W.R. GRACE & CO.
125	AMERICAN CYANAMID
126	SANDOZ PHARMACEUTICALS CO.
127	LORILLARD TOBACCO CO.
128	GAB BUSINESS SVC., INC.
129	S.C. JOHNSON & SON
130	AMERICAN BUILDING MAINTENANCE
131	BRIDGESTONE/FIRESTONE
132	ELECTRONIC DATA SYSTEMS
133	STROEHMANN BAKERIES
134	WICKS COMPANIES
135	USF&G INSURANCE
136	JAMES RIVER CORP.
137	PMI FOOD EQUIPMENT GROUP
138	LAND O'LAKES, INC.
139	CAMPBELL SALES CO.
140	SYNTEX LABORATORIES, INC.
141	GENERAL MILLS
142	WAUSAU INSURANCE COMPANY
143	AMERICAN GREETINGS
144	CNA INSURANCE
145	TEKTRONIX, INC.
146	BANK OF AMERICA
147	KEMPER NATIONAL INSURANCE
148	J.I. CASE CO.
149	NCR CORP.
150	AMTRAK
151	AMERICAN INT'L REALTY CORP.
152	LEGG'S PRODUCTS, INC.
153	MOORE BUSINESS FORMS
154	NALCO CHEMICAL CORP.
155	THE LOS ANGELES TIMES
156	TRW INFORMATION SYSTEMS
157	UNION OIL OF CALIFORNIA
158	PICKER INTERNATIONAL CO.
159	GENERAL FOODS USA
160	FIREMAN'S FUND INSURANCE
161	THE QUAKER OATS CO.
162	REVLON, INC.
163	APPLE COMPUTER, INC.
164	CONTROL DATA CORP.
165	FLOWERS INDUSTRIES
166	INTRACORP
167	WEYERHAEUSER CO.
168	ARKLA, INC.
169	AMERICAN FAMILY MUTUAL, INC.
170	RELIANCE ELECTRIC CO.
171	BELL & HOWELL
172	K-MART CORPORATION
173	FERRELLGAS
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186	DRESSER INDUSTRIES
187	FACTORY MUTUAL ENG.
188	AIR PRODUCTS & CHEMICALS, INC.
189	PERKIN ELMER
190	PETROLANE/SUBURBAN PROPANE
191	ALEXANDER & ALEXANDER
192	McCORMICK & COMPANY, INC.
193	TEXACO REFINING & MARKETING
194	WILTEL COMMUNICATIONS SYSTEM
195	PARKER-HANNIFIN CORP.
196	FINA OIL & CHEMICAL CO.
197	TRW/CSD
198	FLAGSHIP CLEANING
199	CLOROX
200	GENCORP/GENERAL TIRE

The 1992 Top Second 100

Commercial Fleets

'92 RANK	COMPANY NAME & HEADQUARTERS	FLEET CONTACT	CO. OWNED	LESSOR(S)	# CARS	# TRUCKS & VANS	TOTAL
101	ALCO STANDARD CORPORATION Valley Forge, PA	Gail Sugita	—	Wheels	1,800	200	2,000
102	PONY EXPRESS COURIER CORP. Charlotte, NC	William Glasheen	—	Associates	80	1,896	1,976
103	FLEMING COMPANIES, INC. Oklahoma City, OK	Wayne Lankford	—	USFL	1,428	519	1,947
104	MILES, INC. Elkhart, IN	Stacey Kreider	—	GEC Fleet, Wheels	1,188	758	1,946
105	PHILIPS MED. SYS. NO. AMERICA Shelton, CT	Rose Ruchin	—	PHH	1,500	404	1,904
106	AMERICAN HOME PRODUCTS New York, NY	Elizabeth Witkowski	—	Wheels	1,800	100	1,900
107	JOHNSON & JOHNSON New Brunswick, NJ	Joyce Donini	—	PHH	1,700	200	1,900
108	SHERWIN-WILLIAMS CO. Cleveland, OH	David Hall	—	Wheels, McCullagh	900	1,000	1,900
109	CONTINENTAL INSURANCE Cranbury, NJ	Jean Marie Karst	—	PHH	1,873	20	1,893
110	JR SIMPLOT CO. Pocatello, ID	Terry McLaughlin	X	—	125	1,840	1,865
111	OGDEN ALLIED SERVICE CORP. New York, NY	Joe Smith	—	GEC Fleet	600	1,250	1,850
112	SIMPLEX TIME RECORDER Gardner, MA	Jerry Albertini	—	Wheels	1,115	710	1,825
113	AUTOMATIC DATA PROCESSING Roseland, NJ	Mike Sankowitch	—	GEC Fleet	1,550	250	1,800

'92 RANK	COMPANY NAME & HEADQUARTERS	FLEET CONTACT	CO. OWNED	LESSOR(S)	# CARS	# TRUCKS & VANS	TOTAL
114	TELEDYNE, INC. Los Angeles, CA	Jim Stockwell	X	—	1,400	400	1,800
115	ALLSTATE INSURANCE CO. Northbrook, IL	Donald Gorr	X		1,671	108	1,779
116	LIBERTY MUTUAL INSURANCE Boston, MA	Barbara Feinberg	X	—	1,735	36	1,771
117	SCHERING-PLOUGH Kenilworth, NJ	Robert Keckeissen	—	PHH	1,700	67	1,767
118	EATON CORPORATION Cleveland, OH	Robert Wagner	—	GEC Fleet, BLC Corp.	540	1,220	1,760
119	BRISTOL-MYERS SQUIBB CO. Princeton, NJ	Jeff Zielinski	—	PHH	1,693	55	1,748
120	MONTGOMERY WARD Chicago, IL	Roseann Neveitt	—	GEC Fleet, PHH	160	1,540	1,700
121	USG CORP. Chicago, IL	Mary Sabathne	—	ARI, Donlen	1,000	700	1,700
122	HALLMARK CARDS Kansas City, MO	Debbie Mize	X	—	1,560	130	1,690
123	ROCHE BIOMED LABS Burlington, NC	Jane Crabbe	—	Wheels	1,593	96	1,689
124	W.R. GRACE & CO. New York, NY	J.W. Enterline	—	PHH, USFL	395	1,290	1,685
125	AMERICAN CYANAMID Wayne, NJ	Robert DeFeo	—	ARI, PHH, Wheels	1,600	75	1,675
126	SANDOZ PHARMACEUTICALS CO. East Hanover, NJ	Audrey Wilson	—	Wheels, Emkay	1,632	30	1,662
127	LORILLARD TOBACCO CO. New York, NY	Sal Giacchi	—	GEC Fleet, PHH	380	1,280	1,660
128	GAB BUSINESS SVC., INC. Parsippany, NJ	C.E. Eckman	—	PHH	1,648	8	1,656
129	S.C. JOHNSON & SON Racine, WI	Karen Fries	—	Wheels, Associates	600	1,017	1,617
130	AMERICAN BUILDING MAINTENANCE San Francisco, CA	Ellie Walsh	—	PHH	700	900	1,600

'92 RANK	COMPANY NAME & HEADQUARTERS	FLEET CONTACT	CO. OWNED	LESSOR(S)	# CARS	# TRUCKS & VANS	TOTAL
131	BRIDGESTONE/FIRESTONE Nashville, TN	Bill Royster	X	—	600	1,000	1,600
132	ELECTRONIC DATA SYSTEMS Richardson, TX	Joe Williams	X	—	975	625	1,600
133	STROEHMANN BAKERIES Horsham, PA	Dale Stevens	—	PHH	0	1,600	1,600
134	WICKS COMPANIES Santa Monica, CA	Ron Amrhein	—	Associates	1,098	486	1,584
135	USF&G INSURANCE Baltimore, MD	James Myers	X	—	1,572	10	1,582
136	JAMES RIVER CORP. Richmond, VA	Rita Stokes	—	ARI, Associates	1,100	400	1,500
137	PMI FOOD EQUIPMENT GROUP Troy, MI	Mark Welty	—	Wheels	408	1,090	1,498
138	LAND O'LAKES, INC. Minneapolis, MN	Bruce Charon	—	Farmcredit, USFL	850	647	1,497
139	CAMPBELL SALES CO. Camden, NJ	Charles Schnerr	—	Wheels	1,400	95	1,495
140	SYNTEX LABORATORIES, INC. Palo Alto, CA	R.A. Schlossareck	—	ARI, Wheels	1,307	179	1,486
141	GENERAL MILLS Minneapolis, MN	Henry Paetzel	X	—	1,246	235	1,481
142	WAUSAU INSURANCE COMPANY Wausau, WI	Robert Rakow	X	GEC Fleet, USFL	1,445	15	1,460
143	AMERICAN GREETINGS Cleveland, OH	Gene Lusnek	—	PHH, LPI, GEC Fleet	1,400	50	1,450
144	CNA INSURANCE Chicago, IL	Michael Wagner	—	Wheels, GEC Fleet	1,431	12	1,443
145	TEKTRONIX, INC. Beaverton, OR	Johnnie Schmauder	X	—	800	600	1,400
146	BANK OF AMERICA Concord, CA	Tom Martin	X	—	848	531	1,379
147	KEMPER NATIONAL INSURANCE Long Grove, IL	Frank Pastorino	X	—	1,365	11	1,376

'92 RANK	COMPANY NAME & HEADQUARTERS	FLEET CONTACT	CO. OWNED	LESSOR(S)	# CARS	# TRUCKS & VANS	TOTAL
148	J.I. CASE CO. Racine, WI	Bill McNellis	X	—	325	1,050	1,375
149	NCR CORP. Miamisburg, OH	Anne Mangen	—	GEC Fleet, Wheels	328	1,035	1,363
150	AMTRAK Bear Drive, PA	Ed Stuhl	X	—	100	1,257	1,357
151	AMERICAN INT'L REALTY CORP. New York, NY	Jeffrey Donaldson	X	—	1,321	6	1,327
152	LEGG'S PRODUCTS, INC. Winston-Salem, NC	Gary Mendelsohn	—	PHH	100	1,218	1,318
153	MOORE BUSINESS FORMS Lake Forest, IL	Chuck Blaise	—	ARI	1,300	0	1,300
154	NALCO CHEMICAL CORP. Naperville, IL	Yvonne Bonahoom	—	PHH	1,000	300	1,300
155	THE LOS ANGELES TIMES Los Angeles, CA	Cletus Page	X	—	650	650	1,300
156	TRW INFORMATION SYSTEMS Orange, CA	Janis Christensen	—	GEC Fleet, ARI	700	600	1,300
157	UNION OIL OF CALIFORNIA Los Angeles, CA	Karen Trace	X	—	1,300	0	1,300
158	PICKER INTERNATIONAL CO. Highland Heights, OH	Betty Strader	X	—	1,249	50	1,299
159	GENERAL FOODS USA White Plains, NY	Joy Bloech	X	PHH	1,200	75	1,275
160	FIREMAN'S FUND INSURANCE Novato, CA	Sylvia Jones	X	PHH	1,228	13	1,241
161	THE QUAKER OATS CO. Barrington, IL	Linda Tegtmeyer	—	Associates	1,170	50	1,220
162	REVLON, INC. Edison, NJ	Alan Binstein	—	GEC Fleet	1,200	11	1,211
163	APPLE COMPUTER, INC. Cupertino, CA	Lillian Ferrell	—	GEC Fleet, PHH	1,200	0	1,200
164	CONTROL DATA CORP. Minneapolis, MN	Kathleen Wester	—	McCullagh, GEC Fleet	300	900	1,200

'92 RANK	COMPANY NAME & HEADQUARTERS	FLEET CONTACT	CO. OWNED	LESSOR(S)	# CARS	# TRUCKS & VANS	TOTAL
165	FLOWERS INDUSTRIES Thomasville, GA	Mark Worthey	X	—	0	1,200	1,200
166	INTRACORP Berwyn, PA	Pat Kays	—	PHH	1,200	0	1,200
167	WEYERHAEUSER CO. Tacoma, WA	Janie Ross	—	Nickerson	800	400	1,200
168	ARKLA, INC. Shreveport, LA	Joe Lyons	X	—	186	976	1,162
169	AMERICAN FAMILY MUTUAL, INC. Madison, WI	Gray Perett	—	—	1,101	50	1,151
170	RELIANCE ELECTRIC CO. Cleveland, OH	Phil Tedeschi	—	PHH, GEC Fleet	409	741	1,150
171	BELL & HOWELL Skokie, IL	Mike Winfield	—	Wheels, ARI	1,100	40	1,140
172	K-MART CORPORATION Troy, MI	Alice Schurrer	X	—	992	147	1,139
173	FERRELLGAS Liberty, MO	Jerry Schmitt	X	—	81	1,021	1,102
174	BORG-WARNER PROTECTIVE SERVICES Parsippany, NJ	Audrey Heun	—	—	0	1,100	1,100
175	FMC CORP. Chicago, IL	Lawrence Dakof	X	GEC Fleet	0	1,100	1,100
176	OHIO CASUALTY INSURANCE Hamilton, OH	G. Michael Ulreich	X	—	1,095	5	1,100
177	OXY USA, INC. Tulsa, OK	Bill Jeffers	—	Wheels	180	912	1,092
178	ST. PAUL FIRE & MARINE INSURANCE St. Paul, MN	Paul King	—	GEC Fleet, ARI	1,056	6	1,062
179	THE PILLSBURY CO. Minneapolis, MN	Jon Christensen	—	GEC Fleet	860	200	1,060
180	BECKMAN INSTRUMENTS Fullerton, CA	Patty Whitchurch	X	GEC Fleet	270	780	1,050
181	THE DIAL CORPORATION Phoenix, AZ	Pierce Walsh	—	USFL	0	1,005	1,005

'92 RANK	COMPANY NAME & HEADQUARTERS	FLEET CONTACT	CO. OWNED	LESSOR(S)	# CARS	# TRUCKS & VANS	TOTAL
182	THOMAS J. LIPTON CO. Englewood, NJ	Bill Benzie	—	GEC Fleet	990	10	1,000
183	TEXACO TRADING & TRANSPORTATION Denver, CO	Donna Alinovich	—	PHH	0	975	975
184	FIRST AMERICAN TITLE INSURANCE Santa Ana, CA	John Buehler	—	PHH	952	0	952
185	PINKERTON SECURITY Van Nuys, CA	Andrew Eichner	—	USFL	640	310	950
186	DRESSER INDUSTRIES Dallas, TX	Dennis Duduick	—	NationsBanc	381	565	946
187	FACTORY MUTUAL ENG. Norwood, MA	Thomas Flahive	—	ARI, Wheels	875	6	881
188	AIR PRODUCTS & CHEMICALS, INC. Allentown, PA	Doug Buffington	—	GEC Fleet, Wheels	550	300	850
189	PERKIN ELMER Norwalk, CT	William Amundsen	—	GEC Fleet, PHH	775	75	850
190	PETROLANE/SUBURBAN PROPANE Whippany, NJ	Wally Euart	X	—	200	625	825
191	ALEXANDER & ALEXANDER Baltimore, MD	Mary McCarthy	X	PHH	800	0	800
192	McCORMICK & COMPANY, INC. Hunt Valley, MD	Beverly Boyd	X	McCullagh, PHH, ARI	725	25	750
193	TEXACO REFINING & MARKETING Bellaire, TX	Bernie Bryl	—	PHH, ATT, First Fleet, Chancellor	587	139	726
194	WILTEL COMMUNICATIONS SYSTEM Rolling Mead, IL	Bill Kintigh	X	—	0	708	708
195	PARKER-HANNIFIN CORP. Cleveland, OH	Bridget O'Neill	—	McCullagh-Lease Plan	600	100	700
196	FINA OIL & CHEMICAL CO. Dallas, TX	J.D. Bryan	—	—	227	451	678
197	TRW/CSD Fairfield, NJ	Carol Mitchell	—	USFL	216	435	651

'92 RANK	COMPANY NAME & HEADQUARTERS	FLEET CONTACT	CO. OWNED	LESSOR(S)	# CARS	# TRUCKS & VANS	TOTAL
198	FLAGSHIP CLEANING Malvern, PA	Harold Ulmer	X	ARI, Chrysler Finance, McCullagh	200	434	634
199	CLOROX Oakland, CA	Margaret Deubler	—	—	500	0	500
200	GENCORP/GENERAL TIRE Akron, OH	Bill Gardella	X	—	250	50	300

Automotive Fleet's Top 100 Alphabetical Cross Reference

AIR PRODUCTS & CHEMICALS, INC. 188
ALCO STANDARD CORPORATION 101
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AMERICAN CYANAMID 125
AMERICAN FAMILY MUTUAL, INC. 169
AMERICAN GREETINGS 143
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AMERICAN INT'L REALTY CORP. 151
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BRISTOL-MYERS SQUIBB CO. 119
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CONTROL DATA CORP. 164
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FMC CORP. 175
GAB BUSINESS SVC., INC. 128
GENCORP/GENERAL TIRE 200
GENERAL FOODS USA 159
GENERAL MILLS 141
HALLMARK CARDS 122
INTRACORP 166
J.I. CASE CO. 148
JAMES RIVER CORP. 136
JOHNSON & JOHNSON 107
JR SIMPLOT CO. 110
K-MART CORPORATION 172
KEMPER NATIONAL INSURANCE 147
LAND O'LAKES, INC. 138
LEGG'S PRODUCTS, INC. 152
LIBERTY MUTUAL INSURANCE 116
LORILLARD TOBACCO CO. 127
McCORMICK & COMPANY, INC. 192
MILES, INC. 104
MONTGOMERY WARD 120
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NCR CORP. 149
OGDEN ALLIED SERVICE CORP. 111
OHIO CASUALTY INSURANCE 176
OXY USA, INC. 177
PARKER-HANNIFIN CORP. 195
PERKIN ELMER 189
PETROLANE/SUBURBAN PROPANE 190
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USED-CAR PRICES

The following are average used-car prices for the period ending February 29,1992. Prices are based on wholesale activity at major dealers across the country. They are divided into three zones as indicated on the accompanying map. These averages are calculated electronically. They are based on clean cars only. Proper allowance should be made for upgrading sharp cars and proper deduction taken for fair cars. Automatic transmissions have been included in the averages of all models. This information is published in *Automotive Fleet* by special permission of *Automotive Market Report*.

Model	AVERAGE AUCTION PRICE Zone 1	Zone 2	Zone 3
89 BUICK SKYHAWK			
Coupe	4,852	4,901	4,786
Sedan	4,918	4,968	4,848
88 BUICK SKYHAWK			
Coupe	3,919	3,959	3,866
Sedan	3,977	4,016	3,920
91 BUICK SKYLARK			
Cust. Sedan	8,117	8,198	8,003
90 BUICK SKYLARK			
Cust. Sedan	6,598	6,665	6,506
91 BUICK CENTURY			
Cust. Sedan	9,644	9,742	9,510
90 BUICK CENTURY			
Cust Sedan	7,099	7,171	6,998
91 BUICK LESABRE			
Cust. Sedan	12,044	12,166	11,878
90 BUICK LESABRE			
Cust. Sedan	9,394	9,488	9,263
91 CADILLAC DEVILLE			
Coupe	18,392	18,576	18,136
Sedan	18,573	18,760	18,315
90 CADILLAC DEVILLE			
Coupe	15,377	15,531	15,162
Sedan	15,533	15,689	15,316
91 CADILLAC SEVILLE			
Sedan	18,522	18,707	18,264
90 CADILLAC SEVILLE			
Sedan	15,622	15,779	15,402
91 CHEVY BERETTA			
Coupe	8,007	8,088	7,898
90 CHEVY BERETTA			
Coupe	6,628	6,694	6,534
91 CHEVY CORSICA			
Hatchback 5 Dr	7,724	7,799	7,614
90 CHEVY CORSICA			
Hatchback 5 Dr	6,253	6,317	6,155
91 CHEVY CAVALIER			
Sedan	6,201	6,263	6,113
90 CHEVY CAVALIER			
Sedan	4,757	4,805	4,689
90 CHEVY CELEBRITY			
Wagon 6-P	7,781	7,859	7,671
89 CHEVY CELEBRITY			
Sedan	5,008	5,059	4,939
91 CHEVY CAPRICE			
Sedan	10,278	10,381	10,134
90 CHEVY CAPRICE			
Sedan	7,377	7,451	7,273
91 CHRYSLER LEBARON			
Sedan	9,151	9,244	9,023
90 CHRYSLER LEBARON			
Sedan	8,100	8,179	7,985
91 CHRYSLER NEW YORKER			
Salon Sedan	11,600	11,718	11,439
90 CHRYSLER NEW YORKER			
Salon Sedan	9,667	9,763	9,531
89 CHRYSLER FIFTH AVENUE			
Sedan	8,183	8,267	8,069
88 CHRYSLER FIFTH AVENUE			
Sedan	6,290	6,353	6,202
89 DODGE ARIES AMERICA			
Sedan	3,935	3,973	3,879
88 DODGE ARIES AMERICA			
Sedan	3,085	3,115	3,040
91 DODGE SHADOW			
ES Sedan	7,573	7,648	7,469
90 DODGE SHADOW			
Liftbk 5 Dr	5,406	5,459	5,331
91 DODGE DYNASTY			
Sedan	8,577	8,664	8,457
91 FORD ESCORT			
Htchbk 4 Dr LX	6,219	6,282	6,132
90 FORD ESCORT			
Htchbk 4 Dr LX	4,696	4,743	4,629
91 FORD MUSTANG			
LX-4 Coupe	7,882	7,961	7,772
91 FORD TEMPO			
GL Sedan 4 Dr	6,757	6,826	6,663
90 FORD TEMPO			
GL Sedan 4 Dr	5,421	5,473	5,343
91 FORD TAURUS			
GL Sedan 4 Dr	9,854	9,953	9,717
90 FORD TAURUS			
GL Sedan 4 Dr	7,484	7,560	7,381
91 FORD CROWN VICTORIA			
Sedan	11,303	11,415	11,144
90 FORD CROWN VICTORIA			
Sedan	9,082	9,174	8,957
91 THUNDERBIRD			
Coupe	10,486	10,591	10,336
90 THUNDERBIRD			
Coupe	8,205	8,288	8,091
91 LINCOLN			
Town Car Exec. Sedan	16,882	17,052	16,646
Mark VII LSC Coupe	18,560	18,767	18,321
Continental Exec. Sedan	16,882	17,052	16,646
90 LINCOLN			
Town Car Sedan	15,541	15,695	15,322
Mark VII LSC Coupe	14,741	14,888	14,533
Continental Sedan	14,237	14,381	14,039
91 MAZDA 626			
LX Sedan 4 Dr	9,244	9,335	9,169
91 MERCURY COUGAR			
LS Coupe	10,798	10,907	10,647
90 MERCURY COUGAR			
LS Coupe	8,898	8,987	8,772
91 MERCURY TOPAZ			
GS Sedan 4 Dr	6,888	6,956	6,793
90 MERCURY TOPAZ			
GS Sedan 4 Dr	5,551	5,608	5,473
91 MERCURY SABLE			
GS Sedan 4 Dr	10,027	10,128	9,887
90 MERCURY SABLE			
GS Sedan 4 Dr	7,581	7,657	7,972
91 MERCURY GRAND MARQUIS			
GS Sedan	11,523	11,639	11,360
90 MERCURY GRAND MARQUIS			
GS Sedan	9,595	9,690	9,459
91 MITSUBISHI MIRAGE			
Sedan 4 Dr	6,536	6,602	6,484
90 MITSUBISHI MIRAGE			
Sedan 4 Dr	5,729	5,786	5,683
91 NISSAN MAXIMA			
SE Sedan	15,257	15,409	15,136
90 NISSAN MAXIMA			
SE Sedan	13,580	13,717	13,473
91 NISSAN SENTRA			
Sedan 2 Dr	6,999	7,072	6,944
90 NISSAN SENTRA			
Sedan 2 Dr	4,966	5,015	4,925
91 NISSAN STANZA			
XE Sedan 4 Dr	9,665	9,760	9,586
90 NISSAN STANZA			
XE Sedan 4 Dr	8,269	8,352	8,204
91 OLDS CIERA			
S Coupe	9,558	9,654	9,425
S Sedan	9,644	9,742	9,510
90 OLDS CIERA			
S Coupe	7,156	7,225	7,056
S Sedan	6,854	6,923	6,757
91 OLDS CALAIS			
Sedan	7,248	7,321	7,148
90 OLDS CALAIS			
Sedan	5,865	5,924	5,783
91 OLDS CUTLASS SUPREME			
Coupe	10,524	10,630	10,376
90 OLDS CUTLASS SUPREME			
Coupe	8,089	8,169	7,975
91 OLDS 98 REGENCY			
Elite	16,462	16,627	16,233
90 OLDS 98 REGENCY			
Sedan	11,761	11,879	11,598
89 PLYMOUTH RELIANT			
Sedan	3,914	3,955	3,860
88 PLYMOUTH RELIANT			
Sedan	3,085	3,115	3,040
91 PLYMOUTH SUNDANCE			
Coupe 5 Dr	6,076	6,137	5,990
90 PLYMOUTH SUNDANCE			
Liftbk 4 Dr	5,390	5,443	5,315
89 PLYMOUTH GRAN FURY			
Salon Sedan	4,224	4,265	4,164
88 PLYMOUTH GRAN FURY			
Salon Sedan	3,513	3,548	3,464
91 ACCLAIM			
Sedan	7,173	7,246	7,073
91 PONTIAC SUNBIRD			
LE Coupe	6,837	6,905	6,741
LE Sedan	6,922	6,993	6,825
90 PONTIAC SUNBIRD			
LE Coupe	5,505	5,560	5,429
LE Sedan	5,582	5,637	5,504
91 PONTIAC 6000			
LE Sedan	9,481	9,576	9,349
90 PONTIAC 6000			
LE Sedan	6,970	7,040	6,872
91 PONTIAC GRAND AM			
LE Sedan	7,909	7,988	7,798
90 PONTIAC GRAND AM			
LE Sedan	6,626	6,692	6,533
91 PONTIAC BONNEVILLE			
LE Sedan	11,435	11,551	11,276
90 PONTIAC BONNEVILLE			
LE Sedan	9,144	9,234	9,015
91 PONTIAC GRAND PRIX			
LE Sedan	10,290	10,392	10,147
90 PONTIAC GRAND PRIX			
LE Sedan	8,122	8,203	8,008
91 SUBARU LEGACY			
Sedan 4 Dr	8,984	9,074	8,912
91 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	10,850	10,960	10,765
90 TOYOTA CAMRY			
Sedan 4 Dr Deluxe	9,335	9,428	9,260
91 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	8,262	8,345	8,194
90 TOYOTA COROLLA			
Sedan 4 Dr Deluxe	6,923	6,991	6,865
91 TOYOTA CRESSIDA			
Lux Sedan	16,761	16,929	16,627
90 TOYOTA CRESSIDA			
Lux Sedan	14,277	14,417	14,163
91 VOLKSWAGEN JETTA			
GL Sedan 4 Dr	8,429	8,515	8,362
90 VOLKSWAGEN JETTA			
GL Sedan 4 Dr	7,454	7,527	7,394
91 VOLVO			
240 DL Sedan	14,234	14,378	14,120
90 VOLVO			
240 DL Sedan	11,260	11,371	11,169

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February 21,1992	AVG. NATIONWIDE PRICES	UNLEADED GAS	DIESEL
	Full-Serve	132.96	141.07
	Self-Serve	103.44	116.79

City*	Unleaded Gas		Diesel	
	Full-Serve	Self-Serve	Full-Serve	Self-Serve
Atlanta, GA	143.2	89.2	146.0	109.6
Boston, MA	124.8	112.0	129.9	125.1
Chicago, IL	156.0	112.0	146.3	124.5
Dallas, TX	152.7	101.3	157.4	115.7
Denver, CO	157.7	103.3	146.9	117.4
Detroit, MI	153.0	98.5	135.1	113.7
Houston, TX	150.6	101.5	150.7	118.0
Los Angeles, CA	148.3	110.5	149.3	122.4
Memphis, TN	151.0	100.2	146.9	117.3
Miami, FL	147.7	101.4	153.6	118.7
Minneapolis, MN	151.5	103.4	113.4	111.8
New Orleans, LA	157.4	108.6	146.5	121.0
Omaha, NE	131.2	106.4	134.1	116.0
Philadelphia, PA	139.0	105.8	138.7	120.1
Phoenix, AZ	149.6	103.9	147.4	122.3
Portland, OR	134.8	112.8	128.7	125.4
San Francisco, CA	152.0	111.3	157.3	126.7
Seattle, WA	148.8	106.2	151.3	121.7
St. Louis, MO	134.2	89.1	129.9	101.3
Washington, D.C.	152.8	109.4	151.4	122.4

Source: Lundberg Survey Inc. ©1992
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